B.C. Farm Employers' Handbook

Book Four

MOTIVATING, EVALUATING & TRAINING

Published 1991 by

AGRI-FOOD REGIONAL DEVELOPMENT SUBSIDIARY AGREEMENT

Canada

BCFB

Catalogue Information

Canadian Cataloguing in Publication Data
Owen, Lorne.
B.C. farm employers' handbook

Prepared by Lorne Owen, Pat Davidson and Lindsay Brooks. Cf. Acknowledgements.
Contents: Book 4. Motivating, evaluating and training
ISBN 0-7726-1454-7 (set).—ISBN 0-7726-1458-X (Bk. 4).

1. Farms - British Columbia - Personnel management - Handbooks, manuals, etc. 2. Farm management - British Columbia - Handbooks, manuals, etc. I. Davidson, Pat, 1944 - . II. Brooks, Lindsay. III. British Columbia. Ministry of Agriculture, Fisheries and Food. IV. Title. V. Title: Motivating, evaluating and training.

S562.C3093 1991 630.68'3 C92-092007-1

B.C. Farm Employers' Handbook

Book Four Motivating, Evaluating & Training

The B.C. Farm Employers' Handbook is a series of five booklets designed to assist farm managers to effectively manage their human resources.

The books in the series and a brief outline of their contents are as follows:

Book One: Personnel Planning and Regulations
- Deciding to Become an Employer
- The Personnel Planning Process
- Complying with Regulations
- Keeping Records

Book Two: Hiring
- Objectives
- Job Description
- Recruitment
- Interviewing
- Testing
- Checking References
- Making the Selection
- Offering the Job/Advising Unsuccessful Candidates
- Employment Agreement
- Orientation

Book Three: Supervising
- Leadership
- Supervision
- Delegation
- Personal Style
- Special Supervisory Situations

Book Four: Motivating, Evaluating & Training
- *Managing for Peak Performance*
- *Performance Evaluation*
- *Wages, Incentives, Benefits*
- *Training*

Book Five: Communications, Problem Solving & Discipline
- Communications
- Dealing with Conflict
- Disciplining
- Dismissal and Termination

92-03359/

Acknowledgements

The material in this book builds on earlier works published by other agricultural extension agencies in Canada and the United States. Without the leadership offered in those works, this material could not have been put together. The people and the agencies for whom they work are listed in the Reference section at the end of this book.

We also acknowledge the input from Garth Bean, Agricultural Employment Services and assistance from other Agricultural Employment Centres. We appreciate the farmers and managers who reviewed and offered input to the first draft: Bruce McTavish, John Van Dongen, John Schroeder, Howard Joynt and Garth Bean.

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This publication was funded by the Productivity Enhancement Program of the Canada-British Columbia Agri-Food Regional Development Subsidiary Agreement (ARSDA 1985-90). The Agreement, which provides a variety of programs for the development of the agri-food industry, is cost-shared equally by the governments of Canada and British Columbia through Agriculture Canada and the British Columbia Ministry of Agriculture, Fisheries and Food, respectively.

The responsibility for the publication as written and all conclusions reached therein is the author's alone. The publication does not necessarily reflect the opinions of the federal and provincial governments which funded the publication.

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Introduction

The B.C. Farm Employers' Handbook is written as a guide to farm managers. The book will assist you to recruit better employees; to supervise, motivate and train your employees to achieve maximum performance; and to discipline and fire them should that be required.

Sound human resource management can result in increased productivity, reduced staff turnover, motivated employees and satisfied managers. Use this Handbook to help you achieve these ends.

The Handbook is divided into five books. We don't expect you to read each from cover to cover. Instead, familiarize yourself with the contents, place the books where they can be easily found and refer to them when you have need for specific information.

This is the fourth in a five-book series on farm employment management. The first book looks at the personnel planning process and offers a guide in deciding how many and what type of employees are required. That book also advises on the regulations about which an employer needs to be aware.

The second book discusses how to hire an employee and describes the 10 steps in the hiring process, starting with defining the job that needs to be done and ending with hiring and orientating the employee.

The third book deals with supervision, one of the key elements in a good employee-employer relationship. Book 3 discusses leadership - what it is, different styles of leadership and the sources of leadership power. The book also discusses supervision skills and delegation skills. It looks at different personal styles and how to deal with these. The book concludes with a look at some special supervisory situations, including supervising family members and temporary or seasonal workers.

This book looks at another key element in a good employee-employer relationship: motivation. Managers have several tools they can use to encourage motivation. One is to create a motivational climate. Another is to supply an opportunity for employers and employees to give each other feedback through performance evaluations. A third is to pay fair wages. And finally, by providing training, managers can enhance the performance of their employees.

Managing for Peak Performance

Why are some workers interested in their work and and in the farm where they work? These workers take a special interest, notice things that need attention and are willing to give the job extra thought and care. Why are other workers turned off, showing no interest in doing anything beyond the the bare minimum that is expected of them? These workers fail to notice the soft tire, the dry bearing or the cow in heat.

The difference between these types of workers is one of motivation. One group is motivated to do a good job; the other is not.

Tools for Motivation

- ❒ Create motivational climate
- ❒ Evaluate employee/employer performance
- ❒ Pay fair wages
- ❒ Provide training

What is Motivation?

"You can only get so much more productivity out of organization and automation. Where you really get productivity leaps is in the hearts and minds of people."

James Baughman, Head of General Electric Management Development Institute.

Motivation is something we feel within ourselves. It is the putting into action of an inner drive. Motivation involves the idea of directing energy to satisfy a need.

We cannot truly motivate anyone else - motivation must come from within. What we can do is create a climate where motivation is encouraged by good working conditions, incentives, positive feedback and other job-related factors.

Behavioural scientists say everything we do, we do in an attempt to fulfill needs. Several different theories have been formulated about human needs. One of the better known ones is Maslow's hierarchy of human needs. Maslow said we have five categories of needs:

1. Physiological needs: the need for maintenance — food, water, air; the fulfillment of all the needs to maintain our daily existence.
2. Safety needs: the need for security in our environment. This includes the need for protection from things that can hurt us and the need for stability in the events of our life.
3. Social needs: the need for love, affection, sense of belonging in our relationships with others.
4. Esteem needs: the need for respect, prestige, recognition in the eyes of others; the need for a sense of personal respect and competence.
5. Self-actualization needs: the need for the fulfillment of our potential, to use our personal abilities to their fullest and most creative extent.

As individuals, whether managers or employees, we strive to fulfill our unmet needs. Employees are most satisfied and most productive when they are given an opportunity to meet some or all of their needs. The challenge then to you, the manager, is to understand what your employees' needs are and then supply a motivational climate in which those needs can be met.

Providing a Motivational Climate

To provide a motivational climate for your employees, you need to understand what is important to employees.

The following chart may assist you in understanding some job factors that may satisfy different needs of your employees.

Things People May Want From Work

Needs	What a Person Wants from a Job
Physiological	Physically comfortable working area Minimum salary/wage
Safety	Safe working conditions Job security Good base salary/wage and benefits
Social	Friendly co-workers Sponsored social activities on and off the job Compatible supervisor
Esteem	Promotion to higher-status job Praise and recognition from supervisor High-performance evaluation and merit-pay increase
Self-actualization	Creative and challenging work Participation in decision making Flexibility and autonomy

Things to remember about needs:

- Until the physiological and safety needs are met, the other needs do not act as strong motivators.
- No two people are alike; therefore needs vary in type and intensity from individual to individual.
- People's needs change as time progresses and circumstances change.

"Many jobs are too small for the human spirit. The boundaries of many jobs simply aren't elastic enough to make room for workers' vast hearts and spirits. As a result, the wasted energy and abandoned vision are resources lost to both the employer and the employee."

John P. Schuster

Another method which can be used to assess what's important to employees is to look at a list of the 10 most common reasons for labour problems.

Might your employee be able to say any of the following?

	Yes	No
1. I can't communicate my concerns	____	____
2. Too many bosses tell me what to do	____	____
3. I don't know exactly what my responsibilities are	____	
4. I'm not growing and not learning new skills	____	____
5. My time off is not specified	____	____
6. I don't get paid enough for my skills	____	____
7. The work environment is dangerous, unhealthy and inadequate	____	____
8. I don't get any recognition when I perform well	____	____
9. I have problems with my employer's spouse	____	____
10. My employer breaks his promises	____	____

If you answered "yes" to any of the above, try to correct that situation as soon as possible.

Human beings are more than just a job description. Each of us needs to be given the opportunity to direct our special talents and energies towards identifiable goals. A well designed job can go a long way to satisfying these needs.

A well designed or enriched job has three characteristics:

1) It is complete, understandable, and doable
2) The employee makes as many decisions as possible
3) The manager provides the employee with consistent feedback about performance.

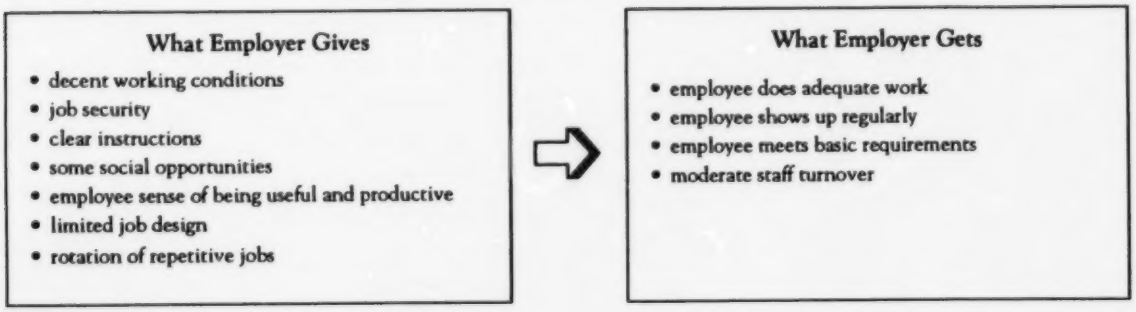
Your business is as good as your employees; your employees are as good as your management.

The motivational climate you provide can determine whether or not you get peak performance from your employees. The more thought and effort you put into the management process, the greater the performance, quality and productivity you'll get in return. Not only will you be a satisfied manager but you'll have satisfied employees.

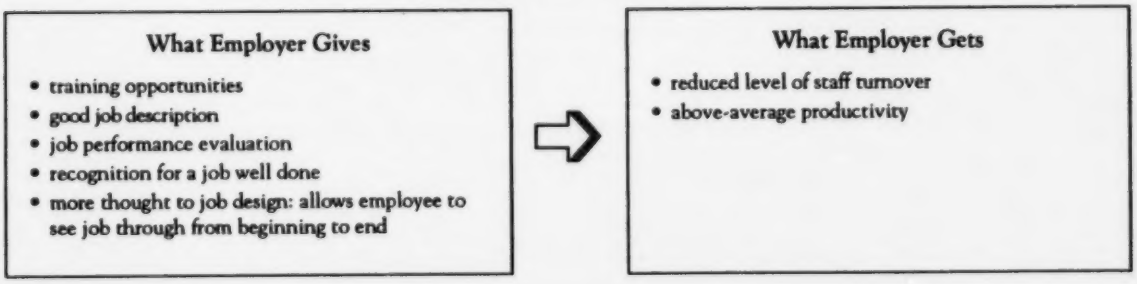
The more you put in to your management efforts, the more you will get in return. If you are prepared to give your employees only a basic level of skilled management, you will get only a basic level of output in return. If you are prepared to put more effort and thought into the management process, the output and level of satisfaction of your employees will increase.

The following schematic uses boxes to depict the relationship between your management efforts and what you get in return.

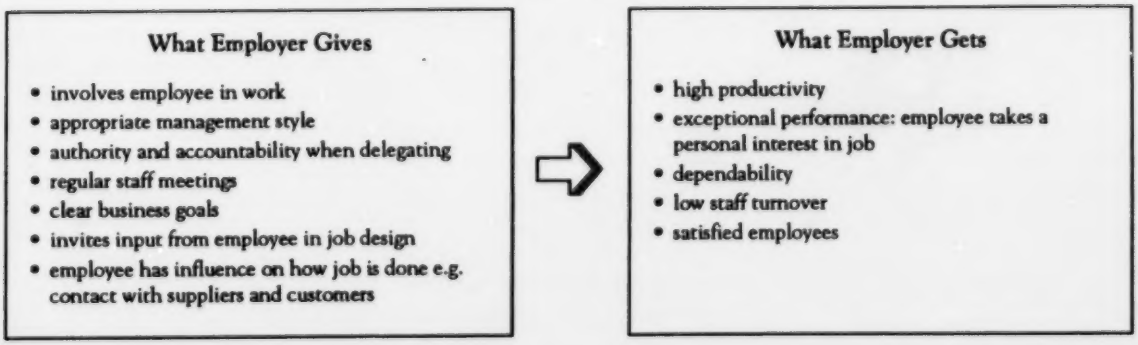
If Manager Gives Basic Management Effort


What Employer Gives
• decent working conditions
• job security
• clear instructions
• some social opportunities
• employee sense of being useful and productive
• limited job design
• rotation of repetitive jobs
What Employer Gets
• employee does adequate work
• employee shows up regularly
• employee meets basic requirements
• moderate staff turnover

If Manager Gives More Effort


What Employer Gives
• training opportunities
• good job description
• job performance evaluation
• recognition for a job well done
• more thought to job design: allows employee to see job through from beginning to end
What Employer Gets
• reduced level of staff turnover
• above-average productivity

If Manager Gives Maximum Effort


What Employer Gives
• involves employee in work
• appropriate management style
• authority and accountability when delegating
• regular staff meetings
• clear business goals
• invites input from employee in job design
• employee has influence on how job is done e.g. contact with suppliers and customers
What Employer Gets
• high productivity
• exceptional performance: employee takes a personal interest in job
• dependability
• low staff turnover
• satisfied employees

The primary task of any manager is to establish a motivational climate in which employees can achieve their own goals and, at the same time, contribute to the success of the farm.

Evaluate Your Success in Developing a Motivational Climate

The following checklist can help you judge your success in developing a motivational climate on your farm. For each item rate yourself (be very frank) on how often you use that skill. Test your effectiveness with subordinates. Give all subordinates copies and ask them to rate you on each of the items. Ask them to be frank. Compare your own personal rating with theirs and discuss it with them. How well do you stack up? What changes would you like to make in your management style?

	Always	Usually	Sometimes	Never
1. I give my people honest recognition on a regular basis.	_____	_____	_____	_____
2. I try to make each person's job as meaningful as possible.	_____	_____	_____	_____
3. I work at getting to know my people as individuals.	_____	_____	_____	_____
4. I provide clear requirements for every task.	_____	_____	_____	_____
5. I provide my people with feedback about performance on a regular basis.	_____	_____	_____	_____
6. I am available to my people.	_____	_____	_____	_____
7. If my people don't come to me with information, I go to them and ask.	_____	_____	_____	_____
8. I try to match farm and employee needs.	_____	_____	_____	_____

Performance Evaluation

Tools for Motivation

- ☑ Create motivational climate
- ☑ Evaluate employee/employer performance
- ☐ Pay fair wages
- ☐ Provide training

Two questions every employee needs the answers to are, "What is my job?" and "How am I doing?"

Day-to-day monitoring of employee performance should be a primary and ongoing responsibility of all managers. In addition, every manager should do at least an annual evaluation of a subordinate's overall performance. The successful manager will always be concerned about people's performance and helping them reach their potential.

Purpose of Evaluation

Good employees need the opportunity to communicate their goals, desires and concerns.

From an employee's perspective, a performance evaluation provides the following:

- allows me to compare how well I'm doing at my job with how well I need to do
- gives me clear guidelines for improvement
- makes me feel I can succeed in my weak areas if I adopt these guidelines
- gives me opportunity to share my concerns about my job and career with my employer

From the employer's perspective, a performance evaluation:

- provides feedback from the employee
- determines how the employee's work contributes to my farm objectives
- builds teamwork in solving problems
- ensures the employee wants to improve and can improve
- gives an opportunity to identify training needs

Conducting performance appraisals should not be a dreaded task. Honest evaluations provide employees with a clear indication of their strengths and weaknesses and minimize legal proceedings when less than competent employees must be discharged.

Performance evaluations must be conducted with an open mind. One-sided employee evaluations can create more problems than they solve. Go into a performance evaluation with the goal of creating an atmosphere where an honest exchange of information between the employee and the employer can take place.

Tips on How to Do Evaluation

Performance evaluation has four key activities: prepare, communicate, agree and follow-up.

You can divide the elements of an effective performance appraisal into five steps:

Step One: Establish work methods and productivity levels expected for each position: use your job description as a blueprint for achievement and ask employees to define their goals.

Step Two: Monitor employees at random to determine performance levels.

Step Three: Regularly provide employees with both positive feedback and constructive criticism. Keep records to avoid surprises at the evaluation interview.

Step Four: Plan the evaluation interviews: analyze records and performance goals; ask employees to complete a pre-interview evaluation.

Step Five: Conduct the evaluation interviews: discuss the self-evaluations completed by employees; work together on ideas for improvement; set new goals.

Employee Involvement in the Process

Most of us would prefer to point out our own weaknesses before someone else does just as most of us do not respond well to harsh criticism. By giving employees the opportunity to evaluate their own performance, you increase their willingness to accept the need for improvement.

Try the following technique:

1. Ask the employee to bring to the evaluation interview a list of three things: a)tasks always performed well, b)areas of recent improvement, and c)areas needing improvement. Tell the employee that you will prepare an equivalent set of lists on the employee's performance.
2. Refer to the records you assembled during regular monitoring and make your own list, using the same headings.

Work together to joint problem solve.

3. During the interview, discuss the employee's list and compare it with your own.
4. Respond as an active listener to employee's discussion of his own weaknesses, concerns and goals: offer support for improvement and help set new goals.

Appraisal Records

Your written record of a performance appraisal accomplishes the following functions:

- summarizes the records you've kept during regular monitoring in terms of the employee's performance in various areas
- provides the employee with an overall performance rating
- identifies goals for future performance and career development
- provides space for the employee's response

On the following pages, we've provided two sample evaluation forms. The first form, Quarterly/Monthly Job Review Sheet, is used to give specific and quantifiable feedback to the employee. We've provided a few examples.

The second form, Performance Appraisal Evaluation Form, is used once or twice a year and provides an opportunity for you and your employee to discuss a broad range of concerns about the job.

Sample Evaluation Forms

Quarterly/Monthly Job Review Sheet

Date: _____

Period under Review: _____

Employee Name: _____

Task	Planned Completion Date	Task Accomplished	Comments
1. Winterize power equipment, drain pumps and sprayers; add coolants to engines	October 1, 19xx	☑	Completed on schedule; good attention to detail
2. Take soil samples and submit to lab for analysis	November 1, 19xx	☑	(your comments)
3. Restock parts bin and clean up shop	December 15, 19xx	☐	_____ _____ _____
4. Locate and spot spray Canada thistle patches	October 15, 19xx	☐	_____ _____ _____
5. Inspect combine, adjusting and replacing worn bearings, belts, bushings and chains. Advise on any major repairs required.	_____	☐	_____ _____ _____ _____ _____
6. Attend two-day soil conservation workshop and be prepared to discuss recommendations with manager	_____	☐	_____ _____ _____ _____ _____
7. Attend first-aid course	_____	☐	_____ _____ _____

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Performance Appraisal Evaluation Form

(to be completed by the supervisor)

Name: _____ S.I.N. _____ Date: _____

Position Title: _____ Time on present job: _____

Appraisal Period: _____ to _____ Date of appraisal: _____

A. Major job responsibilities and levels of productivity expected:

B. Results actually achieved:

C. Comments on factors which may have affected performance:

D. The following aspects of the job have always been performed well:

Employee's own self-perception: (to be filled in after interview)

E. The following areas have recently improved:

Employee's own self-perception:

F. The following areas still require improvement:

Employee's own self-perception:

G. Recommendations for training and development

H. Goals for next performance review

I. Overall assessment of performance:

___Outstanding _____Satisfactory _____Unsatisfactory

If overall performance is not satisfactory, what action is recommended:

J. Employee's comments on this assessment:

_____ _____ _____

Employee signature Supervisor signature Date

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Performance Appraisal Evaluation Form

(to be completed by employee)

Name: _____ Position: _____

Date Presented: _____ Date Discussed: _____

A. I have always performed the following aspects of my job well :

B. I have recently improved in the following aspects of my job:

C. I require improvement in the following aspects of my job:

D: Additional comments, possible problems, suggestions and/or ideas:

Evaluation Follow-up

Performance appraisal has to be acted upon. Don't just put the completed form in the filing system and forget about it until the next performance review.

The following chart indicates follow-up that you and your employee may choose depending on how the employee is preforming.

Performance Appraisal Evaluation	Employee's Career Path	Discussion Objective
Outstanding	⇨ Promotion	⇨ Consider opportunities
	⇨ Growth in present assignment	⇨ Make development plans
	⇨ Raise or bonus	
	⇨ Broadened assignment	⇨ Review possibility of extending responsibility
	⇨ No change in duties	⇨ How to maintain performance level
Satisfactory	⇨ Promotion	⇨ Consider possibilities
	⇨ Growth in present assignment	⇨ Make development plans
	⇨ Raise or bonus	
	⇨ No change in duties	⇨ How to maintain or improve performance level
Unsatisfactory	⇨ Performance correctable	⇨ Agree on plan for correction and gain commitment
	⇨ Performance not	⇨ Review possible re-assignment or prepare for dismissal

Wages, Incentives and Benefits

Wages

Tools for Motivation

- ☑ Create motivational climate
- ☑ Evaluate employee/employer performance
- ☐ Pay fair wages
- ☐ Provide training

While satisfactory wage levels do not necessarily motivate employees to superior performance, employees who are dissatisfied because of wages will likely perform below their capabilities. When deciding on compensation for an employee, keep in mind that wages need to be:

a) sufficient to guarantee an acceptable standard of living

b) competitive with others in the community (farm and non-farm) taking into account working conditions, bonuses, and fringe benefits (e.g. housing)

c) based on hours worked (regular and overtime)

d) based on the knowledge, experience and skills the individual brings to the job

e) based on skills and training required by the employee and the degree of responsibility given to an employee

f) not so high that they do not allow for regular pay increases, cost of living adjustments and increased efficiency or performance adjustments.

Methods of Payment

Hourly - An hourly rate has the advantage of making it easier to ask employees to work extra hours when needed.

Weekly or Monthly Wage- Under this method of payment, hours of work must be specified and adhered to, otherwise, employees will become resentful of working overtime. Weekly or monthly wages should be supplemented with adequate compensation for overtime, in the form of time off with pay or overtime pay.

Wage Increases - Any changes in the compensation you pay an employee should be consistent with performance evaluation. Often evaluation is a good time to discuss the issue of compensation. Employees who need considerable improvement in their work should not be rewarded with a large merit raise. On the other hand, if an employee has been making good progress and is taking on more responsibility, you may decide a substantial merit increase is warranted.

Incentives

The purpose of incentive plans is to motivate the employee to greater productivity. If wage levels and employer-employee relations are good, there seldom is need for an incentive plan.

An incentive plan can be justified only to the extent that it is mutually advantageous and rewarding. When developing an incentive plan, involve the employee, otherwise the employee may distrust it. If not handled correctly, incentives can easily turn into disincentives.

If you decide to design an incentive plan, keep in mind the following "do's" and "don'ts".

Incentive Plan

Do's and Don'ts

Do	Don't
✓ ***Analyze*** the purpose of the incentive (e.g., increase the number of berries picked).	✪ Do not make incentives the standard by substituting bonus payments and benefits for wages.
✓ ***Specify*** the performance required to receive the reward (e.g. 10 cows culled); establish standards of "poor", "good", and "excellent".	✪ Do not award "poor" workers for progressing to "good" rather than "excellent". Do not treat employees arbitrarily: one system for all.
✓ ***Link*** the reward directly to the performance so the worker can see a direct correlation between the work and the bonus.	✪ Do not add the bonus pay into the regular wages: include it as a separate cheque.
✓ ***Involve*** the workers in the program so they know what is expected and how performance translates into the bonus or reward.	✪ Do not reduce wages if productivity increases: workers must feel the program is fair and will not result in negative consequences.
✓ ***Formulate*** incentives that are easy to compute so that the employee readily understands how to qualify.	✪ Do not make the standards so high that an individual employee is unable to reach them.
✓ ***Pay*** the bonus/reward as soon as possible after the worker meets the requirements.	✪ Do not give a bonus for only one task to avoid tempting workers to slight other tasks.
✓ ***Design*** a range of incentives that appeal to the worker's need for responsibility and personal achievement.	✪ Do not substitute cash bonuses for other forms of incentives such as training or promotion.
✓ ***Follow-up*** on the program and make adjustments as necessary to ensure profitability.	✪ Do not lose quality control: anticipate loopholes.

Benefits

A benefit is categorized as any compensation given to employees beyond the regular wages. Benefits can include food, housing, heat, insurance, pension plans, flexible work hours, sick leave. holidays, vacation time and time off.

As a farm employer, do you know the cost of the benefits you offer? Do your employees know the value of the benefits they receive? The honest answer to these questions is often "no". Yet benefits, or the lack of them, can often be the issue that will cause an employee to take another job. In most jobs, the benefits package is valued at between 15 and 30 per cent of the amount of the wage or salary.

As you consider your benefits package, realize that needs vary with employees. A single worker has different needs from a married worker with a family. With two-worker families, there may be duplicate benefits provided. If the spouse's employer provides medical benefits, there is no need for it in your farm package. Young workers may not feel the same need for insurance or pension plans as an older worker would.

Providing your employees with useful benefits sends a positive message to them. You care about them not only as workers but as people with varying needs.

Take a look at some typical benefits:

a) Housing - In times past, supplying the "hired help" with housing was considered the norm. This assumption is now changing. If you have good housing to offer, it can be an attractive benefit. If, on the other hand, the housing you offer your employees is the old farmhouse that you haven't been able to rent, the provision of such housing could be an irritant rather than a benefit.

Home ownership is a goal that many people have. Farm employees are no exception. It may be that your employees would be happier renting or purchasing housing in the closest village or town. Offering housing as a benefit must be carefully considered. There are pros and cons.

b) Food and farm produce - estimating the value of these benefits is not simple. Do you price them at the farm gate value or at retail value? Whichever you decide, make sure your employee understands the value of what you are offering.

c) Fringe benefits - this category includes items such as group life insurance, pension plans, and sick leave benefits. It is often difficult for a single manager to offer these benefits. Larger organizations such as marketing boards or trade associations may be in a position to manage benefit packages for a number of small employers. Group rates are often lower than a single operator would have to pay. You may want to check to see if such options are available to you.

d) Legislated benefits - Provincial and federal governments legislate certain benefits. These include Canada Pension Plan, Workers' Compensation, Unemployment Insurance and paid vacations. Because these are legislated requirements, they are often not considered to be benefits, yet they are important to the employee's security and their value should be considered.

A Benefits Checklist

- Have you analyzed your benefit package?
- What is the total value of benefits you provide?
- Do you discuss benefit needs with each employee?
- Are employees given a wage statement showing the benefits provided?
- Have benefits been "tailor made" to meet individual needs?
- Are these benefits included as part of the employment agreement?
- Is the compensation package reviewed as part of an annual performance evaluation?
- Have you tried any new kinds of benefits?

Training

Why Train?

Employees trained to perform their jobs at the highest possible level of competence influence your farm in two positive ways:

1. Job satisfaction among employees improves as employees feel challenged and supported in their development.
2. Productivity and ultimately profits improve as trained employees reach their potential.

Tools for Motivation

- ☑ Create motivational climate
- ☑ Evaluate employee/employer performance
- ☑ Pay fair wages
- ☑ Provide training

Employers get out of employees only as much as they put into them. If you give little attention to your employees, you will likely get little out of them. The time, effort and cost of training are worth it.

All your employees can improve their work performance by participating in training programs designed to meet their particular needs. To make the training commitment, you need planning and an empathy for what the employee knows and does not know.

Training makes the complex seem simple.

Even workers who do what may seem to be the most basic and simple of tasks can be trained so the task becomes easier and faster for them. A study was done in a greenhouse in Germany where workers were required to package potted plants for shipment. Simply by teaching the workers different ways to perform their job, the total number of pots prepared per hour per worker increased from 189 to 488, well over double the output. While all training may not result in such dramatic results, it can enhance the productivity of your operation.

The Training Plan

As you think about training required in your operation, keep in mind two key things we know about human behaviour.

1. We learn quicker and retain it longer when we want to learn. The training must meet the learner's needs not the trainer's needs.
2. Adults learn differently than children. Children learn out of respect for and fear of elders; adults learn because they feel a need to - a need to grow, to achieve, to have power or any combination of these.

The key to successful training, then, is to involve the learner. Involve them in the training design and in doing the training.

Five Steps in the Training Process

1. **Identify training needs:** Sources of information: performance appraisals, productivity statistics, safety incidents, employee requests

2. **Set training objectives:** What specific tasks should the worker be able to do after training? Change the oil in the tractor? Birth a calve?

3. **Select training methods:** Individual or group instruction? Course outline: progress from basic to complex in small, easy-to-master steps.

4. **Use the four-step method:** Prepare, Present, Try Out, Follow Up. Active involvement promotes learning: we learn by doing.

5. **Evaluate the training:** Have the objectives been met? How does the employee feel? What are the "bottom-line" results or benefits?

Once you've developed your training plan, you get down to the actual training. Focus first on the learners. How do they feel and what do they want? How should the trainer respond to these feelings?

Following is a chart which shows how each of the learner and trainer feel as they progress through the four-step training method.

Learner's Attitudes	Trainer's Response	Approach Category
I really want to operate the new tractor. I already know how to operate the old tractor.	Recognize the learner's sincere motivation to learn and put him at ease. Determine what the learner already knows and encourage his interest.	**Prepare**
What's new about this tractor?	Describe the features of the tractor: add to the learner's existing knowledge.	**Present**
What exactly do I do first, second, third.	Demonstrate the *step-by-step* operation of the tractor. Ask questions.	
Help me do it myself. Let me practice.	Ask the learner to explain each task as it's performed. Correct errors.	**Try-Out**
How am I doing?	Check frequently. Approve progress. Conduct interactive tests.	**Follow-up**

Remember: What gets rewarded gets repeated.

The Four Step Method

Step 1

Prepare

- ❒ Put the learner at ease.
- ❒ Find out what he or she already knows about the job.
- ❒ Get him or her interested in learning the job.
- ❒ Place him or her in the correct position.

Step 2

Present the Operation

- ❒ Tell, show, illustrate, and question carefully and patiently.
- ❒ Stress key points.
- ❒ Instruct clearly and completely: one point at a time – but no more than the learner can master.

Step 3

Try-out Performance

- ❒ Test by having the learner perform the job. Have him or her tell and show you and explain key points.
- ❒ Ask questions and correct errors.
- ❒ Continue until you know he or she knows.

Step 4

Follow-up

- ❒ Put the learner on his or her own.
- ❒ Check frequently. Designate someone who can help if needed. Encourage questions. Get the learner to look for key points as he or she progresses.
- ❒ Taper off extra coaching and close follow-up.

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